Essential Office CD-ROM

Warranty

Please be sure to send in your registration card. If your software fails we will replace it Free, if registered. Sorry, we cannot be responsible for lost data.

Technical Support

Only customers who have registered are eligible. **Before calling: PLEASE!** Have your computer on and our program ready to operate. **Warning**: If you contact technical support for information answered and explained in this manual you will be charged via **MASTERCARD** or **VISA**. If you have a question regarding printing or your Disk Operating System software please refer to your appropriate manuals or call your dealer.

Support Phone Numbers
Hours: 9am-5:30pm CST M-F
Phone (612) 884-7935
FAX (612) 881- 3882

License Agreement

You may use the software for your own personal use only. One backup copy can be made for your files. Any other use is UNAUTHORIZED and ILLEGAL.

Minimum Requirements

Four megabytes of memory - 2 MB of free hard disk space - VGA/SVGA compatible display and capable graphics card. - A IBM compatible computer with a 386 or higher processor. - MS DOS Version 3.3 and above. Windows 3.1 or greater.

Installation for Windows 3.1x

(If your CD-ROM drive is not D:\ substitute the correct drive information for D:\ below).

1. Start Microsoft Windows.
2. While in Program Manager, click the **File** menu.
3. Select (click) **Run**...
4. In the Run dialog box - Command Line type: **D:\SETUP**
5. Click the **OK** button.
6. Follow the instructions, choosing the pertinent options from the install screens. The installation process will create a program group called **Essential Office**, and the icons **Essential Office Backup**, **Essential Office Estimates**, **Essential Office Purchase Orders**, **Essential Office Invoices** and **Essential Office Information & Help**.

Running The Program

Once you've started Microsoft Windows, run the program by: While in Program Manager open the **Essential Office** program group and double click the program you wish to run.

Installation for Windows 95.

Start Windows 95. To install our program properly, use the Windows 95 installer. Users who have the Windows 95 AutoPlay feature correctly setup on their computers can insert our disk and skip down to step 6 below.

1) Insert our CD-ROM program disk into your computer.
2) Choose **Start** from the Task bar then **Settings** and **Control Panel**
3) In the Control Panel window choose the icon, "**Add/Remove Programs**"
4) From the Install/Uninstall tab choose **Install...**
5) Choose, **Next >**, when the Install Program From Floppy Disk or CD ROM box appears .
6) The Windows 95 installer will our locate our installation program and you will see **D:\SETUP**. (**D:** might be replaced with **E:**, **F:** etc.)

7) Choose **Finish** from the bottom of the box to continue.
8) Follow the instructions, choosing the pertinent options from the install screens. The installation process will create a program group called **Essential Office**, and the icons **Essential Office Backup**, **Essential Office Estimates**, **Essential Office Purchase Orders**, **Essential Office Invoices** and **Essential Office Information & Help**.

Running The Program

While in Windows 95 choose **Start** from the Task bar then **Programs, Essential Office** and the program you wish to run.

Essential Invoices

Setup

Store Company Name

Fill out your Company Information.

Build Customer Lists

a) In the **Add-Edit Customer** dialog box, fill out the **Customer Info** area. The Form printed by the **Invoices** program will print **Ship To:** above this address. The **Phone:** information does not print on the final printout, it is for reference only. **Contact:** information if entered will be printed at the top of the **Ship To:** address.

b) Fill out **Tax** information using the format **X.XX**. If you enter your tax rate as **0.0675**, move the decimal two places to the right and enter it as **6.75**. The **% Discount** option reduces the **Unit Price** by percentage entered and calculates the **Sales Price** for you.

Note (If you use the **% Discount** option): While in the **Line Item Editor** enter a **Unit Price**. Leave the **Sales Price** and the **%** field blank.

c) If your **Billing Address** is different from your **Shipping Address**, do not check **Same Address for Billing**. A second address box will come up and needs to be filled out. The form printed by the **Invoices** program will print **Bill To:** above this address.

d) After filling out your **Customer** information, click on **Add New**, this will add the customer information you just entered into the **Customer** database. After clicking **Add New** if you need to make any permanent changes to your customer information go to **Customer List** and select the customer you wish to work on.

Build Product Lists

{The line Item Editor and Database Browser work together if started from "Setup".}

a) In the **Line Item Editor** dialog box, fill out the information in the **Line Item** data area. Use your mouse or Tab key and start with **Description:**. After you have filled in all the information in the **Line Item** area move up to the **Active Database:** field. Put in the name of your first **Database**. Choose **Store Entry** to save the name of the database and your first product.

Note: If you have entered a **Unit Price** and a whole number in the **%** field, the program will calculate the increase to the **Sell Price** for you.

b) To add more items to the **Active Database**, start at **Description:**. Fill in the information for the item to be added and go directly to **Store Entry**.

c) To add another **Database**, start at **(a)** above and repeat the steps you went through to create the first database. After filling in your **Line Item** information make sure the **Active Database** field is empty and type in the new database name. Then go to **Store Entry**.

d) The information you enter in the **Line Item Editor** is stored in a database. To work on this information use the **Database Browser**.

Building an Invoice

Now, after you have filled out the **Setup** information you are ready to build your first Invoice. Information in this section will print on the form. Make sure you are back to the main program screen.

a) With your mouse click once on the **1-1/2 by 4-1/4 in** white box on the top left corner of the screen. This will bring up the **Select Customer** Box. Choose the correct customer from the **Customer List**. Then press the **Accept** button. This will transfer the customer information to the main screen.

Note: You can make temporary changes to the customer information in the **Select Customer** box. Type over the information you want changed and press **Accept**. Any changes you make will only be in effect for the current invoice.

b) Fill in the **P.O.#** (Purchase Order Number)
c) Fill in the **Inv #** (Invoice Number)
d) Fill in the **Order #**
e) Fill in the **Salesperson** to contact or their phone number
f) Fill in your product information. There are two methods for doing this:

Method 1: Underneath **Description** click on **... new item ...**. In the **Database Browser** go to **Active Database:** and choose the first database you plan to pull information from. Under **Line Item** choose (double click) the item you want to transfer to the invoice. In the **Quantity** box enter the quantity and then choose **OK**.

Method 2: While holding down the **Control Key** underneath **Description** use the mouse and click on **... new item...**. This brings up the **Line Item Editor** with a **Quantity** option. Fill in your information and click **OK** to transfer the information directly to the invoice on screen.

Note: If you have product information already on the screen and you need to modify it, use <u>**this**</u> **Line Item Editor**.

g) Fill in your **Ship/Handling**
h) Fill in your **Discount**

Note: Tax is calculated on **Sub Total 1:**

Final Steps: Printing/Saving Your Invoice

File

New - Starts a new Invoice.

Open - Opens previously saved Invoices

Save - Saves the current Invoice (if the file has already been saved, save will overwrite information you have changed).

Save As... - Use this option the first time you save an invoice. Note the name you give the file can contain up to eight letters and needs the extension "**.INV**". Example: **BOBBEST1.INV**

Print... - Prints the current invoice.

Font Selector... - Use the Font Selector to change the font your printer will use when printing out your Invoice. Note you will not be able to change the size of the font or use (Bold, Italic, Underline, Strikethrough).

Print Form Options... - Choose **Yes** if you are using a preprinted form or letterhead. Choose **No** if you want to use the form provided within the program.

Essential Job Estimates

Setup

Store Company Name

Fill out your Company Information.

Build Customer Lists

a) In the **Add-Edit Customer** dialog box, fill out the **Customer Info** area. The Form printed by the **Estimates** program will print **Ship To:** above this address. The **Phone:** information does not print on the final printout, it is for reference only. **Contact:** information if entered will be printed at the top of the **Ship To:** address.

b) Fill out **Tax** information using the format **X.XX**. If you enter your tax rate as **0.0675**, move the decimal two places to the right and enter it as **6.75**. The **% Discount** option reduces the **Unit Price** by percentage entered and calculates the **Sales Price** for you.

Note (If you use the **% Discount** option): While in the **Line Item Editor** enter a **Unit Price**. Leave the **Sales Price** and the **%** field blank.

c) If your **Billing Address** is different from your **Shipping Address**, do not check **Same Address for Billing**. A second address box will come up and needs to be filled out. The form printed by the **Estimates** program will print **Bill To:** above this address.

d) After filling out your **Customer** information, click on **Add New**, this will add the customer information you just entered into the **Customer** database. After clicking **Add New** if you need to make any permanent changes to your customer information go to **Customer List** and select the customer you wish to work on.

Build Product Lists

{The Line Item Editor and Database Browser work together if started from "Setup".}

a) In the **Line Item Editor** dialog box, fill out the information in the **Line Item** data area. Use your mouse or Tab key and start with **Description:**. After you have filled in all the information in the **Line Item** area move up to the **Active Database:** field. Put in the name of your first **Database**. Choose **Store Entry** to save the name of the database and your first product.

Note: If you have entered a **Unit Price** and a whole number in the **%** field, the program will calculate the increase to the **Sell Price** for you.

b) To add more items to the **Active Database**, start at **Description:**. Fill in the information for the item to be added and go directly to **Store Entry**.

c) To add another **Database**, start at **(a)** above and repeat the steps you went through to create the first database. After filling in your **Line Item** information make sure the **Active Database** field is empty and type in the new database name. Then go to **Store Entry**.

d) The information you enter in the **Line Item Editor** is stored in a database. To work on this information use the **Database Browser**.

Building an Estimate

Now, after you have filled out the **Setup** information you are ready to build your first Estimate. Information in this section will print on the form. Make sure you are back to the main program screen.

a) With your mouse click once on the **1-1/2 by 4-1/4 in** white box on the top left corner of the screen. This will bring up the **Select Customer** Box. Choose the correct customer from the **Customer List**. Then press the **Accept** button. This will transfer the customer information to the main screen.

Note: You can make temporary changes to the customer information in the **Select Customer** box. Type over the information you want changed and press **Accept**. Any changes you make will only be in effect for the current estimate.

b) Fill in the **Est #** (Estimate Number)
c) Fill in the **Ref. #** (Reference Number)
d) Fill in the **Salesperson** to contact or their phone number
e) Fill in your product information. There are two methods for doing this:

Method 1: Underneath **Description** click on **... new item ....** In the **Database Browser** go to **Active Database:** and choose the first database you plan to pull information from. Under **Line Item** choose (double click) the item you want to transfer to the estimate. In the **Quantity** box enter the quantity and then choose **OK**.

Method 2: While holding down the **Control Key** underneath

Description use the mouse and click on **... new item...**. This brings up the **Line Item Editor** with a **Quantity** option. Fill in your information and click **OK** to transfer the information directly to the estimate onscreen.

Note: If you have product information already on the screen and you need to modify it, use **this** **Line Item Editor**.

f) Fill in your **Ship/Handling**
g) Fill in your **Discount**

Note: Tax is calculated on **Sub Total 1:**

Final Steps: Printing/Saving Your Estimate

File

New - Starts a new Estimate.
Open - Opens previously saved Estimate
Save - Saves the current Estimate (if the file has already been saved, save will overwrite information you have changed).
Save As... - Use This option the first time you save an estimate. Note the name you give the file can contain up to eight letters and needs the extension "**.EST**". Example: **BOBBEST1.EST**
Print... - Prints the current estimate.
Font Selector... - Use the Font Selector to change the font your printer will use when printing out your Estimate. Note you will not be able to change the size of the font or use (Bold, Italic, Underline, Strikethrough).
Print Form Options... - Choose **Yes** if you are using a preprinted form or letterhead. Choose **No** if you want to use the form provided within the program.

Essential Purchase Orders

Setup

Store Company Name

a) Fill out your Company Information. The form printed by the **Purchase Order** program will print **Ship To:** above this address.

b) If your **Company** or **Billing Address** is different from your **Shipping Address** do not check the **Same Address For Billing** box. A second Address box will come up for the additional information.

Build Vendor Lists

a) In the **Add-Edit Vendor** dialog box, fill out the **Vendor Info** area. The Form printed by the **Purchase Orders** program will print **To:** above this address. The **Contact:** and **Phone:** information does not print on the final printout, it is for reference only.

b) Fill out **Tax** information using the format **X.XX**. If you enter your tax rate as **0.0675**, move the decimal two places to the right and enter it as **6.75**. The **% Discount** option reduces the **Unit Price** by percentage entered and calculates the **Sales Price** for you.

Note (If you use the **% Discount** option): While in the **Line Item Editor** enter a **Unit Price**. Leave the **Sales Price** and the **%** field blank.

c) After filling out your **Vendor** information, click on **Add New**, this will add the vendor information you just entered into the **Vendor** database. After clicking **Add New** if you need to make any permanent changes to your vendor information go to **Vendor List** and select the vendor you wish to work on.

Build Product Lists

{The Line Item Editor and Database Browser work together if started from "Setup".}

a) In the **Line Item Editor** dialog box, fill out the information in the **Line Item** data area. Use your mouse or Tab key and start with **Description:**. After you have filled in all the information in the **Line Item** area move up to the **Active Database:** field. Put in the name of your first **Database**. Choose **Store Entry** to save the name of the database and your first product.

Note: If you have entered a **Unit Price** and a whole number in the **%** field, the program will calculate the increase to the **Sell Price** for you.

b) To add more items to the **Active Database**, start at **Description:**. Fill in the information for the item to be added and go directly to **Store Entry**.

c) To add another **Database**, start at **(a)** above and repeat the steps you went through to create the first database. After filling in your **Line Item** information make sure the **Active Database** field is empty and type in the new database name. Then go to **Store Entry**.

d) The information you enter in the **Line Item Editor** is stored in a database. To work on this information use the **Database Browser**.

Building a Purchase Order

Now, after you have filled out the **Setup** information you are ready to build your first Purchase order. Information in this section will print on the form. Make sure you are back to the main program screen.

a) With your mouse click once on the **1-1/2 by 4-1/4 in** white box on the top left corner of the screen. This will bring up the **Select Vendor** Box. Choose the correct vendor from the **Vendor List**. Then press the **Accept** button. This will transfer the vendor information to the main screen.

Note: You can make temporary changes to the vendor information in the **Select Vendor** box. Type over the information you want changed and press **Accept**. Any changes you make will only be in effect for the current purchase order.

b) Fill in the **P.O. #** (Purchase Order Number)
c) Fill in the **Ref. #** (Reference Number)
d) Fill in the **Contact** with your company's contact person or their phone number

e) Fill in your product information. There are two methods for doing this:

Method 1: Underneath **Description** click on **... new item ...**. In the **Database Browser** go to **Active Database:** and choose the first database you plan to pull information from. Under **Line Item** choose (double click) the item you want to transfer to the purchase order. In the **Quantity** box enter the quantity and then choose **OK**.

Method 2: While holding down the **Control Key** underneath **Description** use the mouse and click on **... new item...**. This brings up the **Line Item Editor** with a **Quantity** option. Fill in your information and click **OK** to transfer the information directly to the purchase order onscreen.

Note: If you have product information already on the screen and you need to modify it, use **<u>this</u>** **Line Item Editor**.

f) Fill in your **Ship/Handling**
g) Fill in your **Discount**

Note: Tax is calculated on **Sub Total 1:**

Final Steps: Printing/Saving Your Purchase Order

File

New - Starts a new Purchase Order.

Open - Opens previously saved Purchase Order

Save - Saves the current Purchase Order (if the file has already been saved, save will overwrite information you have changed).

Save As... - Use This option the first time you save a purchase order. Note the name you give the file can contain up to eight letters and needs the extension "**.PO**". Example: **BOBBEST1.PO**

Print... - Prints the current purchase order.

Font Selector... - Use the Font Selector to change the font your printer will use when printing out your Invoice. Note you will not be able to change the size of the font or use (Bold, Italic, Underline, Strikethrough).

Print Form Options... - Choose **Yes** if you are using a preprinted form or letterhead. Choose **No** if you want to use the form provided within the program.

<u>Backups</u>

The "Essential Office: Backup" program makes a backup copy of your data files. The data you enter: Customer or Vendor, Company Information, and Product Information, are stored in files with a ".DAT" extension.

If you use the correct extension the "Essential Office: Backup" will save your Invoices, Estimates and Purchase Orders.

To use "Essential Office: Backup": to make backup copies of your Invoices, Estimates and Purchase Orders, make sure that while in the programs you save the files with the following extentions.

- Saved Purchase Orders have a **.PO** extension.
- Saved Invoice files have a **.INV** extension.
- Saved Estimate file have a **.EST** extension.

To Use Essential Backup

Immediately after installation replace the **Essential Office** program disk with a new, blank, **FORMATTED** disk. From the program group **Essential Office** choose the **Essential Office: Backup** icon and "run" it. Click the **Backup** button, choose the floppy disk drive your backup disk is in and all the data files (*.DAT) will be copied to your backup disk. Make a second backup disk. These two disks should be used on a rotating schedule and should be labeled appropriately.

NOTE: You might want to keep a third disk and use it for a weekly backup.

Get in the habit of making regular backups.

If you need to use your backup disks to recover after some kind of computer failure, reinstall the program into the ORIGINAL PROGRAM DIRECTORY (the directory you installed the program into the first time.). Put the most recent backup copy into your computer and in the **Essential Office** group choose the **Essential Backup** icon. Inside the **Essential Software: Backup Utility** dialog box choose **Restore**. This will copy the saved *.DAT files back to your hard drive.

Questions & Answers

Q: When I go to **Setup** and **Store Company Name** the **Company Information** box does not appear fully on my screen. What can I do about that?

A: If the **Company Information** or any other dialog box appears partly off of your screen, click and hold your mouse on the title bar of the dialog box and drag the box to the center of your screen.

Q: How do I enter information into the **Address:** areas of my programs?

A: Use your Tab key or your mouse to move from field to field while in the **Essential Office** programs. To put more than one line in the **Address:** fields press **Enter** at the end of the first line. Blank lines left in the **Address** field will leave blank lines in your address on the printed form.